

TECHNICAL SYLLABUS AND KEY NOTES

COURSE NUMBER TH1

RUNNING EXISTING REPORTS & QUERIES

Classroom Protocol

1. *This is an on-line only class that will cover the steps required to execute an existing query or report from within Edison.*

New Definitions

- **Business Unit:** It is a numeric code that identifies a separate entity within the State of Tennessee. In the earlier system, this was called Administrative Agency. Examples of this would be TennCare, Correction, Finance & Administration, Veterans Affairs etc.
- **ChartFields:** In PeopleSoft applications, the fields that store your chart of accounts and provide your system with the basic structure to segregate and categorize transactional and budget data are called ChartFields. Each ChartField has its own attributes for maximum efficiency and flexibility in recording, reporting and analyzing its intended category of data. While a particular ChartField always represents only one category of data, it stores many values that you use to further categorize that same data.
- **Crystal Reports:** These reports for PeopleSoft from Crystal Definitions helps you generate clear and easy-to-read printed reports containing data from your PeopleSoft applications. You can generate standard reports already created and saved in Crystal Reports.
- **PeopleSoft Query:** It is a reporting tool which enables data to be retrieved directly on screen, it also allows user to create ad-hoc queries and automatically generate SQL code. Allows users to filter information and generate the exact information needed.
- **Pivot Table:** It is a data summarization tool found in data visualization programs such as spreadsheets (e.g. Microsoft Excel). Among other functions, they can automatically sort, count, and total the data stored in one table or spreadsheet and create a second table displaying the summarized data.
- **Process Monitor:** Process Detail page in PeopleSoft Process Scheduler displays the run status of a scheduled request. As PeopleSoft Process Scheduler processes the reports, it updates the status of the request. Allows a person to review the status of scheduled or running processes. One can also view all processes to see the status of any job in the queue and control processes that you initiated.
- **Process Scheduler:** Allows a user to schedule a process to run at a selected time in the future or on a recurring basis.
- **PS/nVision:** It is a PeopleSoft reporting tool that retrieves information from a PeopleSoft database and places it onto a Microsoft Excel spreadsheet. This transfer of information from the database to a spreadsheet enables you to use familiar Excel commands for formatting and analyzing data. Information is transferred in a form that helps you see the big picture, explore details, and make decisions.
- **Report Manager:** It is the repository where all the generated reports are delivered. Using Report Manager, you can see all of the reports that you are authorized to view by opening your report list in a browser.

- **Report Request:** It is a collection of nVision report-specific information such as request name, report title, associated layout, scope, and so on. In a report request, you can use the Scope feature to create multiple instances of a report from a single request.
- **Report Scope:** A report scope allows you to create multiple instances of a nVision report using a single report layout and report request. Using a scope, each report instance contains data filtered to a specific field value.
- **Run Control ID:** It is a unique identifier, associating each operator with his or her own run control table entries. The run control table allows you to create and save parameters or settings for a process or report.
- **Server:** It is a computer dedicated to providing one or more services over a computer network, typically through a request-response routine.
- **SetID:** It is a label used to identify Control Tables. It tells you which subsets of configuration values a Business Unit can access.
- **SQR:** SQR (Structured Query Reporter) for PeopleSoft is both a language and a set of tools that enable you to create professional reports. It enables you to design report layouts, generate a variety of output types.
- **TXT:** It is a filename extension for text files.
- **XLS:** It is a filename extension for the Microsoft Excel file format.

Course Lesson 1: Running Queries

Discussion

In this lesson you will learn how to use Query Scheduler to execute an existing query. You will use this tool to access queries which have already been written and saved as public queries within the Edison system. User security will control both the queries that you will have access to and to the Business Units which will be returned when executing these queries.

Course Lesson 2: Running Reports

Discussion

In this lesson you will cover the steps involved in running different kinds of reports within the Edison system. Three different types of reports will be covered: Crystal, SQR, and PS/nVision reports. Each of these report types are initiated from different pages and require different steps to execute. The mechanics of running each report type and the navigation involved will be covered in this lesson. For the nVision reports the different features of it will be discussed in detail. PS/nVision reports will only be accessed by a limited user base so the specifics covered on PS/nVision reports may not apply to you.

Regardless of which report you are running, you will utilize the Process Scheduler Request page to enter or update the parameter such as server name and process output format. You will use the Process Monitor page to monitor the status of your report.

Upon completion of this lesson, you will be able to:

Run and view different kinds of reports. For nVision reports, you will be able to use features like DrillDown and Report Scopes.